

**SUPERIOR COURT OF CALIFORNIA
COUNTY OF ALAMEDA**

**SELF-REPRESENTED LITIGANTS
ACTION PLAN
December 2003**



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INTRODUCTION

The Superior Court of California, County of Alameda (“Superior Court – Alameda County”) has a long history of commitment to improving service to all court users. The Court has both standing Access and Community Focused Court Planning Committees that have worked to increase access to court services and involve the community in improving available services. The Court’s Long-Range Strategic Plan, originally adopted in 2000 and updated January 22, 2001 specifically identifies several strategies related to assisting self-represented litigants, as follows:

Goal 2B.1 Improve Services to Families.

- 2B.1(a) Provide information and education to self-represented litigants in all family law matters including guardianships.
- 2B.1(b) Provide financial mediation services to self-represented litigants in family law.

Goal 3.5 Promote increased public access and understanding of the court system and its process.

- 3.5(a) Develop and expand litigant assistance programs (e.g. Pro Per Help Centers).

Although the Court’s original focus on assistance to self-represented litigants emphasized the Family Law area, that focus has expanded to address most case types in which litigants are attempting to represent themselves. (See Tables 1 and 2, description of case types, below.) With the assistance of the community-assisted Alameda Superior Court’s Access Committee’s Self-Represented Litigant Work Group (SRL Work Group), the Court has developed this Action Plan to build upon its previous efforts. It is intended that this plan help guide the Court in its continuing community efforts to address the needs of self-represented litigants. (See Appendix 1 for a roster of SRL Work Group members and Appendix 2 for the agenda used at the August 2003 action planning workshop.) This Action Plan represents many hours of work of members of the committee, judicial officers, community collaborators, and court staff and is submitted for purpose of identifying the types of actions the Court would like to take and the resources needed to provide an enhanced level of services to self-represented litigants in Alameda County.

This document is organized as follows:

1. A brief history of prior court efforts related to assisting self-represented litigants;
2. A description of needs to be addressed, i.e., the rationale for developing and implementing this Action Plan;
3. A general description of the vision for the program, i.e., what the Court and its community partners want to see in place in the future for assisting self-represented litigants and program areas in which the Court intends to take action; and
4. A detailed Action Plan for each program area, including tasks, timeline, and resource needs.

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A BRIEF HISTORY

Through the adoption and implementation of its Self-Represented Litigant Action Plan, the Superior Court of Alameda County, continues its involvement in state and national efforts to address the needs of self-represented litigants in the courts. A following brief review of the Court's efforts that have gone before highlights achievement of accomplishments to date and sets the context for the development of this "SRL Action Plan 2003."

November 1999 – The State Justice Institute, American Judicature Society and the Open Hand Society co-sponsored a National Conference on Pro Se Litigation. California, along with 48 other states, sent its Judicial Council-chaired team to this conference with the objectives of sharing information and ideas and developing state initiatives regarding pro se litigation in their states.

April 2001 – The AOC was awarded funding by the SJI and regional conferences were held in the spring of 2001 to roll out information regarding the need for serving Self-Represented Litigants ("SRLs") in the courts. Alameda County's team included judicial officers, court employees, and community based service providers. Questions the team was asked to consider for Alameda County were:

1. What services are currently available?
2. What are the challenges Self-Represented Litigants face?
3. What services are needed?
4. What services would you like to begin?
5. Who are potential partners?

October 2001 – The Superior Court of Alameda County Access Committee's SRL Workgroup formed and held its first session. As the result of its deliberations, the work group identified four potential service models for addressing the needs of SRLs, including:

- ◆ Model 1: Clerk Training
- ◆ Model 2: Coordinate Existing Services
- ◆ Model 3: Triage/Self-Help
- ◆ Model 4: Full Service

November 2001 – The second workgroup meeting was held. Five basic program components were identified: Handouts

- ◆ Reference Materials
- ◆ Training Workshops
- ◆ Computers
- ◆ Help Center Staff

December 2001 – The Court applied for and was awarded an AOC Trial Court Innovation Grant (\$45,000) to help provide the Self-Help Center with a mix of: 1) print; 2) electronic (e.g., web-based, CD-ROM); and, 3) audio-visual (e.g., videos) information resources about legal actions that typically involve self-represented litigants (e.g., various general civil issues, small claims, traffic, dissolutions, etc.) At this time, the Court has

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purchased computer and video equipment and has also made the conceptual commitment to establishing the Wiley W. Manuel Self-Help Center that is currently in operation.

February 2002 – The Court applied for AOC Model Self-Help Center Pilot Grant (\$166,400). The conceptual vision for the overall project would have included a comprehensive center in Oakland and installation of “self-service” help units in a minimum of six court locations, including Alameda, Berkeley, Fremont, Hayward, Oakland-RCD, and Pleasanton. Although the grant was not awarded to the Superior Court of Alameda County at that time, the Court has moved ahead with development of the core center of its self-help program. (See description of current status below.)

November 2002 – To help the Court move forward with the implementation of its SRL Program, the Court applied for \$7,500 Trial Court Improvement Fund Grant to assist in its effort to meet the objectives of the Judicial Council’s operational plan that “trial courts have a strategic plan for serving unrepresented litigants” by June 2003. (The deadline for completion of the plan has been extended by the Administrative Office of the Courts to December 31, 2003. The planning grant was awarded to Alameda to conduct surveys, complete the planning session, and incorporate the results of those efforts into a SRL Action Plan.

Current Status – Although the Court was not awarded the Model Pilot grant for development of its Self-Help Center, it has moved forward with implementing it’s original vision and currently the Court has achieved the following:

- ◆ The Wiley W. Manuel Law Library space was converted to a Self-Help Center that opened to serve the public on August 11, 2003.
- ◆ Basic written materials have been acquired.
- ◆ Computer equipment has been acquired.
- ◆ Court employees have been identified and assigned to manage and staff the Self-Help Center.
- ◆ The County’s Small Claims Advisor has been appointed as the Attorney/Director of the Self Help Center and is assigned to oversee programming in the Self Help Center in addition to administration of the small claims legal advice program.

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SECTION 1. DESCRIPTION OF NEED

- A. Available Court Caseload Information.** The Superior Court of Alameda County serves an increasing number of self-represented litigants annually. Despite challenges in obtaining self-represented litigant information from its current case management system, the court was able to identify recent caseload information in Table 1, below, that demonstrates that many self-represented litigants seek services from the Court. Most assistance is sought in family law, small claims, and unlawful detainer cases.¹

Table 1 – Total Civil Filings Involving SRLS 1999

<i>Limited Civil</i>		
Unlawful Detainer	4,046	
General	2,068	
Small Claims	13,397	
<i>Sub-total</i>		19,524
<i>Unlimited Civil</i>		
Domestic Violence & Civil	3,663	
Harassment		
Elder Abuse	1	
General	1,311	
Marital/Family Relations	5,646	
Probate	275	
<i>Sub-total</i>		10,896
<i>Total</i>		30,407

¹ The Court is in the process of having civil, probate, and family law case management reports certified as being in compliance with the Judicial Branch Statistical Information System (JBSIS). Budget shortfalls have delayed the computer programming and data validation needed to produce JBSIS compliant reports. Compliance across all of the enumerated case types is anticipated in early 2004. At that time, data will be available to update caseload and self-represented litigant information.

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Table 2 – Distribution of SRL Filings by Case Type and Location 1999

	Limited Civil Filings
	% By Case Type
◆ 52% Family Law	◆ 67% Small Claims
◆ 33% DV & Civil Harassment	◆ 21% Unlawful Detainer
◆ 12% General Civil	◆ 12% General Civil
◆ 3% Probate	
	% By Location
◆ 55% - Oakland	◆ 50% - Oakland
◆ 25% - Hayward	◆ 20% - Hayward
◆ 10% - Fremont	◆ 12% - Fremont
◆ Other locations less than 10% each	◆ Other locations less than 10% each

Of course, case filings alone do not represent the full impact of self-represented litigants on court operations. Much time and personnel resources are spent assisting court users who may not end up actually filing or defending a case.

B. Additional Data Gathering. To help the Work Group determine the nature of the services needed by self-represented litigants in Alameda County, the Court conducted surveys of court users, judicial officers and court staff, and legal service providers in the county.

- 1. Overview of Surveys Conducted.** Court User Surveys and Court Staff Surveys were administered by court staff over a 4-week period in all six court locations. Judicial officer surveys were distributed to 95 bench officers. Legal Service Provider surveys were distributed at the July Community Projects Committee meeting at the SRL planning session in August 2003. The approximate response rate for each survey was:

Table 3 – Surveyed Groups and Response Rates

<i>Survey</i>	<i>Response Rate</i>
Court User	50%
Court Staff	70%
Judges	24%
Legal Service Providers	37.5%

- 2. Survey Response Highlights.** A complete copy of the results of those surveys is attached in Appendices 3, 4 and 5. Some of the findings of note in the survey responses provide a good description of the needs of self-represented litigants in Alameda County.

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Table 4 – Highlights of Survey Responses

<i>Increasing Numbers of Self-Represented Litigants:</i>	<ul style="list-style-type: none"> ◆ 63.6% of responding judicial officers perceive an increase in the SRL population over the last several years; and ◆ 71.7% of staff respondents perceive an increased SRL population over the last several years.
<i>Self-Represented Litigant Needs:</i>	<ul style="list-style-type: none"> ◆ Customer survey respondents identified several different languages in which they need assistance, including Spanish, Chinese, Cantonese, and special languages for the disabled. (Unfortunately, the Court was unable to conduct these initial surveys in any language other than English, therefore, it remains necessary to fully assess the extent of need for a multilingual approach to serving self-represented litigants in Alameda County.); ◆ 36% of court users reported NOT receiving helpful service in the courthouse; ◆ Services requested included 163 responses for walk-in Self-Help centers, 54 requests for forms packets with instructions; and 52 requests for staff dedicated to answering procedural questions; and ◆ Staff reported a wide and deep lack of knowledge and understanding of court procedures on the part of self-represented litigants.
<i>Currently Available Resources:</i>	<ul style="list-style-type: none"> ◆ 100% of judicial officers know about the Court's web site but only 86% have visited the web site, and 64% do not know about other available services ◆ 38% of staff indicated they had no knowledge of the court's services for self-represented litigants ◆ 51% of the people who responded to the questionnaire had sought help on the Internet ◆ Most staff indicated that they receive information about available services on a "learn as they go" basis. Improvement of the breadth of skills and depth of knowledge of available services for both judicial officers and staff will assist both court personnel and self-represented litigants in more effectively providing and using court services.

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3. Services Provided By Self-Help Center. During its relatively brief time in operation, the Wiley Manuel Self-Help Center has served individuals in the kinds of case and with the kinds of needs detailed below.

Table 5 – Wiley Manuel Service Data (8-11-03 through 9-13-03)

I. PERSONS SERVED:		Walk-ins	Telephone	Email	Total
		409	214	21	644
II. TYPE OF ASSISTANCE PROVIDED:					
a. CASE ASSISTANCE					
Help with forms		27		No ability	27
Procedural Information		23	6	to receive	29
Brochures/Pamphlets		20		emails at	20
Internet		3		this time	3
Self-Help Books		12		at the	12
Other		10	7	Self-Help	17
Unable to Assist:		7	2	Center	9
117	TOTAL:	102	15	0	117
	Referral made:	26	3		29
b. CLINIC ASSISTANCE:					
L.I.E.P. (Low Income Eviction Project)		91	n/a	n/a	
Small Claims		216	199	21	
VLSC (Volunteer Legal Services Corporation)					
527	TOTAL:	307	199	21	

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III. TYPES OF CASES*	Unlawful Detainer: 27	Restraining Order: 2	Small Claims: 23	Family law 7	Adoption 0	Probate 3	Other Civil 25	Other 15
102								
IV. PRIMARY LANGUAGE*	English 75	Spanish 10	Cantonese/Mandarin 6	Other 11				
V. COURT LOCATION OF CASES:	Oakland	Hayward	Alameda	Berkeley	Pleasanton	Fremont	Other *	Not Disclosed
102 Walk-ins	78	12	2	4	0	0	0	6
VI. STATUS OF LEGAL REPRESENTATION	Self-Help Person Has Attorney 0	Other Party Has Attorney 15						
VII. MONTHLY HOUSEHOLD INCOME	0 - \$2,000 63	\$2,000- \$4,000 12	Over \$4,000 2	Not Disclosed 25				
VIII. HOW LEARNED ABOUT CENTER	Court Personnel: 59	Community Agency: 19	Friend/ Family: 14	Other: 5	Not Disclosed: 5			

*Case assistance provided only; does not include clinics.

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SECTION 2. VISION AND PROGRAM AREAS

This plan envisions the creation of a countywide self-help program consisting of two major components: (1) a comprehensive court-based Self-Help Center and (2) self-service help units placed in six court locations countywide. The goal of the Court's self-help program is to improve the ability of self-represented litigants (SRLs) to effectively pursue legal matters. This goal will be achieved by providing SRLs with access to a variety of informational resources and personal assistance from legal professionals and helping SRLs access court- and/or community-based legal services.

The Alameda County Self-Help Center will serve all self-represented litigants who desire service, regardless of their filing status or which side of a case they represent. The Center will serve both sides of a case if both litigants request service. The Center will not represent SRLs or provide legal advice. No attorney-client relationship will exist with Center users.

The Alameda County Self-Help Center now focuses on case types and sub-case types that typically have a large proportion of SRLs. The Center initially focuses on small claims, unlawful detainers and provides general legal information. The focus will be expanded over time to add additional general civil subjects (e.g., personal injury, contract disputes, conservatorships, guardianships, etc.). It is also expected that the Center will also provide some basic informational resources for SRLs handling traffic infractions and domestic relations matters outside the scope of AB 1058 family law matters. Court staff estimate that the Self-Help Center(s) will have at least 12,000 – 15,000 contacts with SRLs annually once the program is fully operational.

The Self-Help Center is housed in the Wiley W. Manuel Courthouse in downtown Oakland, which is the most logical location for the Center because 50% of Alameda County's limited and unlimited civil cases involving self-represented litigants are filed in Oakland court locations. Locating the Center in a courthouse will maximize access to support services and resources such as the Court's technology network, security services, the Language Line, and adaptive communication devices.

Four full-time court employees—two Legal Process Assistants, one Court Manager, and one Attorney/Director -- will be the beginning staff of the Center. The Attorney/Director will manage all aspects of the Center operations and provide assistance to Center users. The Attorney/Director also administers the small claims legal advice program for the county/courts. The support staff positions will serve as the primary receptionists for the Center and provide case processing for users of the Self Help Center. The court manager will supervise the legal process assistants and the administrative services clerk. The court manager will report to and will be supervised by the Division Chief of the Civil/Small Claims Division at the Wiley W. Manuel Courthouse/Allen E. Broussard Justice Center. The Self Help Center Director/Attorney will report to and will be supervised by the Trial Court Administrator of the Wiley W. Manuel Courthouse/Allen E Broussard Justice Center.

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Given this overall context for the program, the Work Group participants articulated the ongoing vision for the project as described below.

In the Court's preferred future, the Alameda SRL Program will :

- ◆ ***Improve Facilities to Enhance Access:*** The SRL Program envisioned by the Court and community partners will provide improved facilities including a walk-in Help/Information Desk (kiosk/workstation) in every courthouse that will have internet access and access by phone to Self Help Center staff, clear signage in most needed languages; and Children's Waiting Rooms in appropriate courthouses or referrals to community supported alternatives in convenient locations.
- ◆ ***Encourage Court Personnel Courtesy and Competence:*** Highly qualified, helpful, courteous staff will work in an environment that provides private areas at counters for instructions and interactions with court users. Judicial officers and court staff will receive comprehensive and appropriate training (including sensitivity training) to better serve SRLs. Court staff will be offered incentives for excellence in customer service (e.g., Friendliness Recognition Awards, etc.) Volunteers who assist the courts will be well trained, recognized, and rewarded.
- ◆ ***Enhance Availability of Court Services:*** Court services will be more accessible through the use of services such as a 24 hour –7 day a week countywide hotline; after hours services; telephonic appearances; standardized procedures among all courts; responsive grievance processes; timely and effective disability accommodations; a Domestic Violence Unit in appropriate courthouses; links to Alternative Dispute Resolution Services; and broadened services to address the “civil” needs of prisoners. To broadly address access to justice issues, the Court will:
 - ***Provide Language Access:*** Multi-lingual staff, including on-call interpreters/ and the use of “Language Line,” will serve court users in different languages including American Sign Language. All signs and written materials as well as audio/visual aids will be translated into needed languages.
 - ***Simplify Forms and Instructions:*** Self-Help Center personnel and volunteers will provide simplified forms and instructions packets, both in written form and on the website, and will provide workshops and other educational sessions related to forms completion and understanding court processes.
- ◆ ***Collaborate with the Community:*** The Court will reach out to other organizations; widely advertise its Self-Help Website, effectively communicate with other agencies, develop and distribute a comprehensive county service provider Referral List including a Pro Bono Attorney List; and make connections with and collaborate in the use of community resources.

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- ◆ ***Educate the Public:*** The Court and partner community organizations will create education facilities to support the delivery of more pro bono clinics and other educational sessions. The public will be encouraged to and will use the Self-Help Referral Website in greater numbers. The Court will actively collaborate with schools in reaching out to youth and other community members to better inform them of the role and operation of the courts.
- ◆ ***Account for Court User Satisfaction:*** The Court will actively seek and analyze court user assessments of the quality and timeliness of services provided through methods such as the use of User Assessment Surveys and Exit Station Polling. The Court will use feedback received to identify ways in which to continually improve service.
- ◆ ***Receive Greater Funding to Meet the Need of SRLs:*** Through a combination of state allocation, grant writing, and community collaboration, the Court will enhance the amount of resources available and committed to the Self-Help Program serving the needs of self-represented litigants.
- ◆ ***Enhance Availability of Legal Service for Those In Need:*** Through a combination of volunteer programs with the bar, increase the amount of pro bono service provided by attorneys and permit and encourage the provision of “unbundled” legal services for low and middle-income persons.

Building on the Court and community’s significant achievements to date, and continuing the development of a program that will best address the needs of Self-Represented Litigants in Alameda County, the Court, with the assistance of the Work Group, has identified the following areas for ongoing action (SRL Program Areas):

1. **Self-Help Services**
2. **Volunteers**
3. **Technology**
4. **Facilities**
5. **Multi-Lingual Services**
6. **Public Education (External)**
7. **Public Information (Referral Resources)**
8. **Training and Education (Internal)**
9. **Unbundling of Legal Services**

Each of these program areas is described in its own Program Action Plan in Section 3 below, including tasks, timeline, persons responsible and resources.

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SECTION 3. PROGRAM ACTION PLAN

3.a.1. Program Description: **SELF-HELP CENTER SERVICES.** Augment the services provided through the existing Self-Help Center.

Objectives: Educate litigants to better help themselves and meet unmet legal service needs in the community.

Measurable Outcomes: Increase in numbers of people served (using the Center) and an increase in positive responses to customer service surveys at 6 mos., 1 yr., etc.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Evening Hours Workshops	Within 6 mos.	SHC Director/ Community Legal Service Providers	Staff Volunteers
Provide Educational Materials/ Current Codes	Within 2 mos.	Court	\$\$
Assistance with Forms One-on-One	Now	Court staff	Time Staff Training
Multi-lingual Staff Service	Now	Court	Training of volunteers/ interns
Forms Packets & Instructions (all)	Now – within 12 mos.	Court	Training Staff Volunteers
Add Self Help satellite sites at other court locations	3-5 years	SHC Director/ Court Admin.	\$\$\$ /space/equipment

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3.a.2. Program Description: VOLUNTEERS. Recruit and train effective volunteers to help augment services provide by court staff and other service providers.

Objective: Increase the level of service provided by and diversity of volunteers assisting self-represented litigants.

Measurable Outcomes: An effective volunteer program will result in a decrease in the amount of staff time spent in providing basic information. Effectiveness of volunteer services will be assessed through the use of user and staff surveys.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Assess Needs and Capacity for Use of Volunteers	6 mos.	Court	Postage/Staff
Recruit ◆ ID Organizations ◆ ID Individuals?	6 - 12 mos.	SRL Sub-Committee	Staff Meetings
Train Volunteers	12 mos.	SHC Director/ SRL Sub-Committee	Space/ Materials
Orientation	12 mos.	Court Administration	Desk
Incentives Program ◆ T-shirts ◆ Pins ◆ Food ◆ Publicity ◆ Title, Oath	Ongoing	Court	\$\$\$

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3.a.3. Program Description: TECHNOLOGY. Explore, obtain, and use appropriate technology to improve communication with and ability of self-represented litigants to obtain information necessary to effectively represent themselves.

Objective: Use technology to assist in serving self-represented litigants.

Measurable Outcomes: Increased user satisfaction and decreased (repeat) visits.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Teleconferencing (link court locations to Center for services)	3 years	OIT/ Court Administration	Equipment \$\$
Web-based Services (enhanced communication and information availability to all)	1 year	OIT/ Court Administration	Staff
Listserv (enhance ability of court personnel and community partners to keep information current, share perspectives, and problem solve)	1 year	Court	Staff
Videos (provide video educational materials (to assist self-represented litigants who have difficulty reading written materials)	1 – 3 years	Court	Staff \$\$
Kiosks/Carrels (convenient locations for self-represented litigants to access information and complete forms)	3 years	Court Administration	Equipment
Courtesy Phones (enhance communication by providing direct telephone support options from all court locations)	1 year	Court Administration	Equipment \$\$
Case Management Systems (integrate case management systems to ensure accurate and accessible information about the numbers of self-represented litigants served and outcomes they experience)	1 – 5 years	OIT	\$\$

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3.a.4. Program Description: FACILITIES. Use established Wiley Manuel Self-Help Center as core program location (“hub”); provide services or connection capabilities to the hub from all other court locations in the County.

Objective: Greater/Easier Access

Measurable Outcomes: Customer surveys and Observable Customer Service demonstrate increased access to services.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Signs – various languages	6 mos – 1 yr	Court Facilities	\$\$ Design
Volunteer Assistance	1 yr	Volunteer Coordinator	Training Staff
Phone Tree (Intuit live)	2 yr.	OIT	\$\$ Staff
Designated Phone Line Areas	? 3 yr L – 1 yr	Court Facilities	\$\$
Info Kiosks/Boards	6 mos	Court Facilities	\$\$ Staff
Check Physical Access Doors	3 year	Court Facilities	\$\$
Videos/Visuals	1 –3 years	SHC	\$\$ Time Staff
Information at Volunteer Booths	1 year	Court Administration	\$\$ Staff
Customer Service Survey	3 – 4 mos.	PRB	\$\$ Staff
After Hours Access	1 – 2 yrs	Court Administration	\$\$ Staff

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3.a. 5. Program Description: LANGUAGE ACCESS. Many self-represented litigants are not fluent in English and therefore need assistance in other languages to effectively represent themselves. Use of interpreter and translation services is critical to providing effective assistance to these litigants.

Objective: All SRL services are readily accessible to non-English speakers.

Measurable Outcomes: Non-English speakers are fully served; and, written, video and phone resources are available in 3-5 main languages.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Signage: Create multi-lingual signage for door and downstairs (holidays)	1 – 3 years	Court	Translators within Court/Legal Language Access Project (LLAP)
Written Materials: Gather all non-English materials relevant and make them available.	1 – 2 years	Court/AOC Community Projects Committee	Court/Community Projects Committee/Family Law Facilitator
Outgoing Phone Message in 3-5 Languages: Hours, Descriptions	2 – 4 years	Court	Interpreters or LLAP
ASL/Relay –provide staff training and SHC brochure for customers	6 mos.	Court	ADA Representative
Provide Cultural Competency and “Please Hold” trainings for staff	6 mos.	HR	
Prioritize hiring/deployment of multi-lingual/multi-cultural staff	Ongoing	Court	
Written procedures of what SHC procedures and services are provided in 3-5 languages	6 – 12 mos.	Court	LLAP/Community Projects Committee
Translate ALL key materials (*consider joining LLAP)	1 –2 years	Court	LLAP/Community Projects Committee
Create full language plan with input (phone, walk-in, emergencies, mail) and publicize to communities	2-3 mos.	Court	LLAP/Community Projects Committee

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Arrange for on-site interpreters (3-6 hrs/wk) in 3-5 main languages	1 – 3 years	Court	Interpreters or LLAP
Develop written, translated brochure to explain court processes, including how judge will handle interpretation, e.g., language line; can a friend/ family member be used? when?; right to interpreter in DV, criminal and DCSS child support cases; how to request interpreter and what to expect; right to pay interpreter; agencies that might be able to help, if any	6 – 12 mos.	Court	LLAP/ Community Projects Committee

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3.a.6. Program Description: PUBLIC EDUCATION. Many self-represented litigants do not understand the role and operation of the courts. Helping to educate the public about important court operations will enable them to more effectively represent themselves, if necessary.

Objective: Educate the public regarding court procedures.

Measurable Outcomes: The Court is considered user friendly; the level of anxiety of the public regarding using courts is eased.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Educate Volunteers	6 – 12 mos.	Court/ Volunteer Coordinator	Trainers Manuals Videos
Coordinate with Schools <ul style="list-style-type: none"> ◆ Field Trips to Courts ◆ Skits re Real Life Situations ◆ Offer Incentives in H/S to develop student committees 	Ongoing	Community Focused Court Planning Committee/ Law Day Committee	
Distribute pamphlets on different areas of court operation to specific community organizations such as: <ul style="list-style-type: none"> ◆ Boys/Girls Club ◆ YMCA's ◆ CAL WORKS ◆ Midnight B-Ball Program ◆ DV and Homeless Shelters ◆ Anger Management/Batterers Treatment Programs 	Ongoing	Community Focused Court Planning Committee/ Law Day Committee	
Collaborate with Schools in Developing a Training Conference for School Counselors and Teachers	Ongoing	Community Focused Court Planning Committee	

**SUPERIOR COURT OF CALIFORNIA
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3.a.7. Program Description: PUBLIC INFORMATION. Many members of the public do not know what services are available and how to access them. One of the most critical roles the court can play is as a coordinator of referral information for law related services for people in the county.

Objective: Enhance public access to information on substantive law, procedures and forms, available legal services, and sources of other information.

Measurable Outcomes: Website linking community service providers with up-to-date referral information; the Self-Help Center is the clearinghouse of information on available legal services and resources in Alameda County

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Develop criteria for inclusion in referral website	6 mos	SRL Sub-Committee	
Get website up and running	6 – 12 mos	SRL Sub-Committee/ Court Administration/ OIT	
Develop referral criteria to Law Library	6 mos	SRL Sub-Committee/ Law Library Staff	
Develop information on website in languages other than English	1 - 2 years	Court Administration/ OIT	

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3.a.8. Program Description: TRAINING AND EDUCATION. For court personnel and volunteers to effectively assist self-represented litigants, an ongoing training program needs to be developed and administered tailored to court staff and volunteers roles and responsibilities.

Objective: Provide quality, efficient customer service.

Measurable Outcomes: Customer Satisfaction Survey; Employee Job Satisfaction Survey

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Establish Training Content	6 – 9 mos.	Individual Divisions	Experienced Staff
Identify – Compile Resources	6 – 9 mos.	Committee	Technology Staff
Create Training Documentation	6 – 9 mos.	Committee	Archives
Train Trainers	6 – 9 mos.	Consultant	\$\$
Identify Trainees	3 – 6 mos.	Management	N/A
Establish Training Program	6 - 9 mos.	Committee	Technical Writer, Video
Evaluate Training Program	90 days	Trainees	Time

**SUPERIOR COURT OF CALIFORNIA
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3.a.9. Program Description: UNBUNDLING OF LEGAL SERVICES. Work with the Alameda County Bar Association and other local bars in the adoption of necessary rules of courts, form, and other materials to permit attorneys to provide limited scope representation in cases involving self-represented litigants. For court personnel and volunteers to effectively assist self-represented litigants, an ongoing training program needs to be developed and administered tailored to court staff and volunteers roles and responsibilities.

Objective: Increase the amount of available legal services provided by attorneys to low- and middle-income persons who would otherwise represent themselves.

Measurable Outcomes: Increased number of attorneys appear in limited scope representation situations; increased court user satisfaction; decreased frustration among judicial officers and court staff related to improved case processing.

<i>Tasks</i>	<i>Timeline</i>	<i>Responsible Person/Org.</i>	<i>Resources Needed</i>
Convene a Working Group with the Bar Association to Explore Issues Related to Unbundling of Legal Services	6 – 9 mos.	SRL Sub-Committee	Experienced Attorneys and Court Staff
Identify – Compile Resources	6 – 9 mos.	SRL Sub-Committee	JC Unbundling Resources
Create Court Rules, Forms, and Training Materials related to Unbundling of Legal Services for Local Practitioners	6 – 9 mos.	SRL Sub-Committee	Attorney/Staff
Train Local Practitioners on Scope of Unbundling and Procedures Involved	6 – 9 mos.	Attorney/Trainers	\$\$
Kick Off Acceptance of Unbundled Services	1 month – Ongoing	Court	N/a
Monitor Issues that may arise related to Unbundled Legal Services	Ongoing	SRL Sub-Committee	Judicial officers and Court Staff

**SUPERIOR COURT OF CALIFORNIA
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3.b. Program Partners (in alpha order): Potential community partners who will participate in assisting the Court better meet the needs of self-represented litigants are listed below.

- | | |
|--|---|
| ◆ Alameda County Bar Association | ◆ Homeless Action Center |
| ◆ Alameda County Law Library | ◆ Law Center for Families |
| ◆ Alameda County Network of
Mental Health Clients | ◆ Legal Assistance for Seniors |
| ◆ Bay Area Legal Aide | ◆ S.A.V.E. |
| ◆ Centro Legal de la Raza | ◆ Protection and Advocacy, Inc. |
| ◆ East Bay Community Law Center | ◆ Tri-Valley Haven |
| | ◆ Volunteer Legal Services
Corporation |

Other community groups will be identified and invited to participate as the Action Plan is implemented.

3.c. Existing Resources That Will Be Used: Existing court and community resources that will be used in implementing this Action Plan include:

- ◆ Ongoing clinics
- ◆ Library of materials
- ◆ Court Volunteer Program
- ◆ Information desks
- ◆ LLAP
- ◆ Court interpreters and other staff
- ◆ Language Line
- ◆ Translated content from other courts/ agencies
- ◆ CFCPC Speaker's Bureau
- ◆ Pamphlets
- ◆ County web server
- ◆ Court staff development program

3.d. Additional Resources Needed: Additional resources needed to fully and effectively implement this Action Plan are:

- ◆ New informational materials
- ◆ Dedicated spaces and allocated staff in other courts
- ◆ Volunteer training curriculum and content
- ◆ Specialized interpreters
- ◆ Dedicated spaces near filing counters, digitized program content, public terminals, peripherals and network accessibility
- ◆ Public education training and curriculum materials
- ◆ Court rules, forms and training materials related to unbundling of legal services
- ◆ Court staff training curriculum and content

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3.e. Evaluation: To identify the scope of need of self-represented litigants in Alameda County, the SRL Working Group conducted surveys discussed in Section 1 above. These surveys form the baseline data from which further evaluations will be conducted. Additionally, staff in the existing Self-Help Center is regularly gathering data like that presented in Section 1, Table 5 (above) to continuously monitor the types of cases and needs of individuals using Self-Help Center services. The Court is committed to long-term, ongoing evaluation of this effort, including the monitoring of the effectiveness of unbundled legal services (once they are put in place) and to demonstrate the enhanced level of services provided to self-represented litigants over time.

**SUPERIOR COURT OF CALIFORNIA
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4. State Support Areas in which the Judicial Council can provide support at a state level for this effort are identified below.

- a. **Expanded FLF Authority and Small Claims Legal Advice Program.** One significant conclusion reached by the Task Force from reviewing the data analysis and looking at the court's caseload information is that the Court's Family Law Facilitator and Small Claims Advisor assist many individuals who seek assistance from the court, but due to statutory and other limitations, these staff are not able to assist all who seek help with the kinds of legal issues for which they need assistance. As part of its Action Plan, the Court urges the Judicial Council to seek legislative and/or other authority to permit the expansion of the Family Law Facilitator's duties and to seek additional funding to support these expanded services.
- b. **Evaluation Design and Tools.** The Statewide Administrative Office of the Courts (AOC) can play an integral role in helping to design the ongoing evaluation, analysis tools, and procedures for Self-Help programs statewide rather than leaving each court to develop such evaluation measures that may not be consistent with other courts throughout the state.
- c. **Translation Services.** The AOC could provide centralized translation services for forms, instructions, and other public information materials to assist the courts in meeting the needs of non-English speaking litigants.
- d. **Funding and Other Resources.** Although the current State budget situation is problematic, in the future this Court, as well as many others in the state, will need to receive augmented funding and other resources to help them meet the increasing demand from self-represented litigants.

5. Sustaining the Action Plan (2004 Up-Date)

It was recommended that the Access Committee establish a Self-Represented Litigant Implementation Standing Sub-Committee (SRL Sub-Committee) that would be chaired by a judicial officer to be assigned by the Presiding Judge. The SRL Sub-Committee will report to the Access Committee and have a broad court representation of judicial officers, court staff, administration and management from court departments and locations throughout the county. The SRL Sub-Committee will actively consult and collaborate with community agencies and representatives. Hon. Barbara Miller, Presiding Judge appointed Hon. Evelio Grillo, Judge to Chair the SRL Sub-Committee (January 2004).

It was recommended that the Court Executive Officer determine the administrative structure of the SRL initiative and appoint high-level court manager(s) to oversee this court-wide initiative. Chief Executive Officer Arthur Sims appointed Susan Hanks, Ph.D., Bureau Chief, Families & Children's Services Bureau, to coordinate a court-wide Self-Represented Litigant Program (February 2004).

APPENDIX 1

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APPENDIX 2

SUPERIOR COURT OF ALAMEDA COUNTY SELF-REPRESENTED LITIGANT WORKGROUP ACTION PLANNING SESSION Jury Assembly Room, Wiley W. Manual Courthouse August 22, 2003

8:30	<i>Coffee</i>	Presenter/Facilitator
9:00	<i>Welcome and Introductions</i>	Hon. Ken Kawaichi Shelley Stump
9:10	<i>Overview of the Day & Setting Ground Rules</i>	Shelley Stump
9:15	Presentation: <i>Scanning Our Environment -- Defining the Need</i> <ul style="list-style-type: none"> • Court Caseload Data • Project Background and Accomplishments To Date • Review of Recent Survey Results Group Discussion: <i>Implications of Report and Other Environmental Factors</i>	Presenters: Ben Stough Shelley Stump
10:00	Group Discussion: <i>Creating Our Vision – What Do We Want to See in Place in the Next 3 –5 Years?</i>	Shelley Stump
10:30	<i>Break</i>	
10:45	Group Discussion: <i>Identifying Action Arenas</i>	Shelley Stump
12:00	<i>Lunch</i>	
12:30	Creating Our Action Plan: Action Arena Small Groups Identify: Objectives, Measurable Outcomes and <ul style="list-style-type: none"> • Tasks • Deadlines • Persons Responsible • Resource Needs 	Action Arena Groups
2:15	<i>Break</i>	
2:30	Large Group Discussion: <i>Reports from Action Arena Groups</i>	Action Arena Groups
4:15	<i>Closing Reflection and Next Steps</i>	Hon. Ken Kawaichi Shelley Stump
4:30	<i>Adjourn</i>	

APPENDIX 3

SUPERIOR COURT OF CALIFORNIA COUNTY OF ALAMEDA Self-Represented Litigant Action Plan - Court Users Survey Responses

1. Why did you come to the courthouse today?

13 To look at a file – Get copy work

68 File documents

17 Make a court appearance

2 Appear as a witness

26 Get information

16 Other _____

2. What type of case brings you to the courthouse?

25 Civil

40 Small Claim

11 Eviction

26 Family Law – Divorce

19 Child Support

15 Child Custody

16 Domestic Violence

3 Probate

5 Guardianship

3 Conservatorship

9 Other _____

3. Do you have an attorney?

109 No

9 Yes, STOP – This survey is for self-represented litigants only

4. Why don't you have an attorney representing you?

47 Can't afford an attorney

30 Chose to represent myself

27 Other _____

5. Did you get help with the matter that brings you to the courthouse today?

74 Yes

33 No

If yes, where did you get help?

31 Information from court staff

11 Information handed out by court

7 Information from court by phone

10 Small claims advisor

11 Other legal advisor

14 Family Law Facilitator

5 Paralegal

4 Legal Aid

8 Internet

11 Self help books

13 Friend or relative

9 Other _____

6. Was any information you received from the court helpful?

69 Yes

5 No

30 Did not receive information from the court

If yes, please indicate what helpful _____

If no, please indicate what would be helpful _____

7. What self-help services would you like the court to have available for you?

54 Forms packet with instructions

31 Informal brochures

57 A walk in self-help center

28 More information on the website

6 Other _____

52 Staff dedicated to answer procedural questions

29 List of attorneys with their rates and specialties

8. Have you ever used the Internet for help?

57 Yes

54 No

9. Do you need assistance in another language?

9 Yes

102 No

If yes, which language?

10. Do you need special services?

Americans With Disabilities Act accommodation (please specify)

11. Is there anything more that you would like to say about the court's services for the public?

Thank you!

Responses per court location

Court Locations:

AEB = 34

BCH = 1

FHJ = 8

GEM = 10

GSHJ = 2

HHJ = 19

RCD = 47

APPENDIX 4

SUPERIOR COURT OF CALIFORNIA COUNTY OF ALAMEDA

Self-Represented Litigant Action Plan – Judges Survey Responses

Introduction. This document presents the compiled responses to the Judges Survey. The small numbers relate to the numbers of the questions on the survey itself. The larger, bolded numbers indicate the number of responses received in the category indicated. The narrative comments are displayed after each question that requested “Other” information or comments.

Please check your primary work location:

- ¹ **4** Wiley W. Manuel Courthouse, 661 Washington Street, Oakland
- ² **2** Allen E. Broussard Justice Center, 600 Washington Street, Oakland
- ³ **0** George E. McDonald Hall of Justice, 2233 Shoreline Drive, Alameda
- ⁴ **1** Gale-Schenone Hall of Justice, 5672 Stoneridge Drive, Pleasanton
- ⁵ **1** Fremont Hall of Justice, 39439 Paseo Padre Parkway, Fremont
- ⁶ **6** Hayward Hall of Justice, 24405 Amador Street, Hayward
- ⁷ **0** Berkeley Courthouse, 2000 Center Street, Berkeley
- ⁸ **4** Rene C. Davidson Courthouse, 1225 Fallon Street, Oakland
- ⁹ **0** U.S. Post Office Bldg., 201 – 13th Street, Oakland
- ¹⁰ **4** County Administration Bldg., 1221 Oak Street, Oakland

1. Based on your experience over the past five years (or your time of service, if shorter) has the overall proportion of self-represented litigants:

- ¹¹ **6** Increased greatly
- ¹² **8** Increased moderately
- ¹³ **7** Stayed about the same
- ¹⁴ **1** Decreased

2. Please rank from 1 to 5, the following types of requests from self-represented litigants in the order of frequency:

- ¹⁵ **2.8** Requests for appropriate court forms
- ¹⁶ **1.4** Request for information regarding legal remedies (What can I do about a tenant who doesn't pay the rent?....How can I get custody of my grandchild?)
- ¹⁷ **3.5** Logistical questions (hours, locations)
- ¹⁸ **3.4** Assistance with filling out forms
- ¹⁹ **3.7** Requests for attorney referrals
- ²⁰ **2.0** Other
 - ◆ I want to appeal or I want judge to reconsider
 - ◆ Requests for preparation of Family Law Orders
 - ◆ Requests about process of service, CMC statements
 - ◆ Access to law library, phone use, tape players
 - ◆ Court procedures
 - ◆ Legal procedure

3. Please rate the following areas of law in which self-represented litigants often need assistance. (1 = highest need, 5 = lowest need):

- ²¹ **1.4** Family Law – divorce, separation, paternity
- ²² **2.2** Domestic violence
- ²³ **2.5** District attorney child support
- ²⁴ **2.1** Small Claims
- ²⁵ **2.2** Landlord/Tenant
- ²⁶ **2.8** Guardianship/Conservatorship
- ²⁷ **3.3** Probate
- ²⁸ **3.3** Juvenile law
- ²⁹ **4.3** Post trial/Appeals
- ³⁰ **3.0** General Civil

4. Do you know that the Court has a website? ³¹ **22** Yes ³² **0** No

5. If so, have you visited www.co.alameda.ca.us/courts/? ³³ **19** Yes ³⁴ **3** No

6. Do you know what services the Court currently has to assist self-represented litigants?
³⁵ **14** Yes ³⁶ **8** No

7. In your opinion, what materials or services are the most effective for enabling the Court to provide assistance to self-represented litigants?

- ³⁷ **4** More information on the website
- ³⁸ **18** Staff who can answer procedural questions
- ³⁹ **11** Informational brochures
- ⁴⁰ **12** Forms packets with instructions
- ⁴¹ **19** A walk-in self service center
- ⁴² **5** Workshops
- ⁴³ **11** Bi-lingual assistance
- ⁴⁴ **1** Other

◆ Family Law is a specialty area and already has its own set of services to assist self-represented parties. It would be helpful to have mediation for non-custody issues, and to allow the facilitator to give advice on issues other than custody.

8. What obstacles, if any, do you think the Court will have to overcome to establish programs/services for self-represented litigants? Please indicate the nature and sources of opposition to any of the programs.

⁴⁵ **20** Funding:

- ◆ Competition for \$
- ◆ Lack thereof
- ◆ Lack of money for staffing and supplies

⁴⁶ **2** Bar

- ◆ Bar providing free services to those who could pay with no means test

⁴⁷ **16** Lack of personnel, equipment, space

- ◆ Competition for \$ & space
- ◆ Lack of personnel, equipment, space time and space crunch w/no money

⁴⁸ **3** Bench

- ◆ Bench lack of patience with already crowded calendars

⁴⁹ **12** Line between legal advice and procedural information

- ◆ Difficult to individualize

- 50 **9 Untrained staff**
 - ◆ Problems in recent years - institutional memory being lost
 - ◆ Untrained staff needs to know more about how to deal with self represented parties and more in depth information about procedures
- 51 **5 Staff resistance**
- 51 **9 Language barriers**
 - ◆ Competition for \$
 - ◆ Many variants
- 53 **9 Difficulty satisfying self-represented litigants**
- 54 **2 Internal problems/coordination**
- 55 **1 Other**
 - ◆ Require undue proportion of time

9. Please share any additional thoughts you may have regarding self-represented litigants. Please attach an additional page if needed.

- 56
 - ◆ They desperately need legal advice/information/assistance
 - ◆ Parties that represent themselves for the most part **expect** a great deal of assistance from the Court at all levels - Ethical problems abound
 - ◆ Staff who provide direct assistance to pro pers **must** have attorney supervision and regular training.
 - ◆ Self-represented litigants need a person and/or place (such as a walk-in services center) to consult with as to resources, forms, procedures, etc. The website is informative but we may often have litigants who (1) d/n have access to a computer and (2) do not process information well by viewing on the computer.
 - ◆ In a criminal trial/criminal law & motion department and in doing 8102-03 W&I petitions, my exposure to self-represented litigants is limited
 - ◆ A self-help center and/or a mobile self-help center (like in Ventura County) would go a long way - many people require bi-lingual services.
 - ◆ We can't ignore the problem, because it is definitely not going away. It has increased significantly in the 15 years I have been with the court.
 - ◆ Assisting self-represented litigants takes more time, more skill and more patience. It requires staff to know more about procedures and what is required for different aspects of cases that means a higher level of training. Staff has learned in the last few years the difference between legal advice and legal information so I don't think that will be as big a problem as it would have been 5 years ago. The reality is that there are a lot of people that don't qualify for free services but also can't afford full fee legal representation. Language lines are available to assist with language barriers. Means tests can be used if the issue is those who can't afford lawyers and those that choose not to use lawyers but could afford them. This would help deal with Bar issues but is more difficult to administer. I think the statistics show that most self-represented litigants are not likely lawyer candidates. With more litigants appearing without lawyers, the court has to provide the assistance, it's the logical place. The court needs to figure out the best way with limited resources.

APPENDIX 5

SUPERIOR COURT OF CALIFORNIA COUNTY OF ALAMEDA

Self Represented Litigants Action Plan – Court Staff Survey Response

Introduction. This document presents the compiled responses to the Court Staff Survey. The small numbers relate to the numbers of the questions on the survey itself. The larger, bolded numbers indicate the number of responses received in the category indicated. The narrative comments are displayed after each question that requested “Other” information or comments.

Please check your primary work location:

- ¹ **4** Wiley W. Manuel Courthouse, 661 Washington Street, Oakland
- ² **12** Allen E. Broussard Justice Center, 600 Washington Street, Oakland
- ³ **5** George E. McDonald Hall of Justice, 2233 Shoreline Drive, Alameda
- ⁴ **2** Gale-Schenone Hall of Justice, 5672 Stoneridge Drive, Pleasanton
- ⁵ **3** Fremont Hall of Justice, 39439 Paseo Padre Parkway, Fremont
- ⁶ **40** Hayward Hall of Justice, 24405 Amador Street, Hayward
- ⁷ **4** Berkeley Courthouse, 2000 Center Street, Berkeley
- ⁸ **20** Rene C. Davidson Courthouse, 1225 Fallon Street, Oakland
- ⁹ **2** U.S. Post Office Bldg., 201 – 13th Street, Oakland
- ¹⁰ **0** County Administration Bldg., 1221 Oak Street, Oakland

1. Based on your experience over the past five years (or your time of service, if shorter) has the overall proportion of pro per litigants:

- ¹¹ **38** Increased greatly
- ¹² **28** Increased moderately
- ¹³ **19** Stayed about the same
- ¹⁴ **1** Decreased

2. Please rank from 1-5 the following types of requests from pro per customers in the order of frequency. (1 = most frequently requested, 5 = hardly ever requested):

- ¹⁵ **2.0** Requests for appropriate court forms
- ¹⁶ **2.0** Request for information regarding legal remedies (What can I do about a tenant who doesn't pay the rent?....How can I get custody of my grandchild?)
- ¹⁷ **3.5** Logistical questions (hours, locations)
- ¹⁸ **2.4** Assistance with filling out forms
- ¹⁹ **3.6** Requests for attorney referrals
- ²⁰ **0** Other _____

(If you add something here, you may rank it as well)

3. Do you know that the Court has a website?

²¹ **92** Yes ²² **0** No

4. Have you ever used the Court's website at www.co.alameda.ca.us/courts/?

²³ **70** Yes ²⁴ **21** No

5. Do you feel knowledgeable enough about existing resources outside the Court so that you could provide referral information to pro per customers?

²⁵ **55** Yes ²⁶ **34** No

6. Based upon your experience, what are the most frustrating obstacles you encounter when working with pro per litigants in the court offices? If you can, please rank your responses from 1-4 in order of frequency (1 = most recent, 4 = least frequent):

7. What are the most frustrating obstacles you encounter when working with pro per litigants in the courtroom? If you can, please rank your responses from 1-4 in order of frequency (1 = most recent, 4 = least frequent):

Combined Responses to Questions 6 and 7: Most frustrating obstacles:

45 Need help completing forms

41 Don't understand procedures, rules

27 Ask for legal advice

10 Lack of cooperation/civility/hygiene

8. As court staff, what do you find most gratifying when you assist pro per litigants?

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- ◆ A simple but sincere thank you
- ◆ After having explained how to do a particular filing, having them come back with it filled out correctly, with the right amount of copies and the correct filing fees
- ◆ Answering procedural questions and assisting them in finding legal advice resources that will expedite their case or complaint
- ◆ Appreciation
- ◆ Assisting customers that really depend on you for filing documents and respects you as an employee of the court. Informing customers as to procedures.
- ◆ Being able to assist with helpful and useful resources
- ◆ Being able to communicate with all litigants to properly process their documents
- ◆ Being able to help people feel safe
- ◆ Being able to help, or direct to appropriate persons
- ◆ Being able to provide enough resources for fair court proceeding
- ◆ Explaining systemic process so they don't leave confused / referring to resources for help
- ◆ File and answer questions expeditiously without many interruptions
- ◆ Giving right info in order to proceed with filing
- ◆ Good communication, patience, and customer understands
- ◆ Gratitude when system works
- ◆ I try to help them as much as I can without getting into legal questions
- ◆ If I can guide them to the right source if I can't give them the proper info.
- ◆ Just a simple thank you - seeing pro pers follow instructions
- ◆ Knowing I have helped them through a difficult process
- ◆ Knowing you had a part in serving them
- ◆ Most are encouraged to read documents more carefully
- ◆ Providing them concrete help & realistic structure
- ◆ Seeing them do as well, or almost as well, as when they have an attorney
- ◆ Seeing them satisfied that I could help them
- ◆ Self-help website and legal resource list
- ◆ Showing that staff is concerned with assisting, trained and competent
- ◆ Thanks
- ◆ That I have assist the litigants where he or she feels that the questions were answered and referral were given to assist in filing a claim
- ◆ That they are slightly more self-sufficient in navigating the courthouse and/or legal system
- ◆ That we can actually completely assist them and they understood
- ◆ The ones that listen when you inform them where they can find information.

Responses to Question 8 cont'd;

- ◆ The pleasure of meeting different kinds of person & personalities. Having the experience of adjusting myself to please my client. The experience teaches me to be flexible and more understanding.
- ◆ Then the help I've given is positive - they understand the procedure - they feel helped.
- ◆ They desperately need your assistance and you are able to make things easy for them
- ◆ They've done their research and basically know what they're processing and paying the fee without any complaints
- ◆ When a pro per litigant realizes he needs to seek legal advice before proceeding on the wrong foot
- ◆ When clients go home happy
- ◆ When customers are not rude, who genuinely care about the good service I provide
- ◆ When I am able to assist them in getting the answers they need within the courts guidelines or direct them to the proper services
- ◆ When I can answer most of their questions
- ◆ When I can point them in the right direction
- ◆ When I can really help someone.
- ◆ When litigants do their own legal research
- ◆ When paperwork is done correctly, and when they put in a good word for you
- ◆ When pro per litigant has their paperwork in order and they don't need much assistance
- ◆ When pro per litigant is appreciative of any and all help that I was able to provide
- ◆ When pro per thanks you that their petition or papers are filed and orders are also approved
- ◆ When pro pers leave office feeling they have accomplished their task
- ◆ When someone says thank you - not very often after they stand in line for a long time
- ◆ When their case is completed to their satisfaction
- ◆ When they actually listen to the instructions provided and the complete documents correctly
- ◆ When they appreciate assistance we provided
- ◆ When they are able to accomplish what they are trying to do
- ◆ When they are satisfied and leave happy
- ◆ When they are satisfied with my customer service
- ◆ When they are thankful
- ◆ When they complete filing.
- ◆ When they complete filing.
- ◆ When they have done their research on how to file their documents.
- ◆ When they leave feeling they received assistance and are no longer frustrated by the system
- ◆ When they leave know what has just happened and what needs to be done next
- ◆ When they leave satisfied
- ◆ When they say thank you
- ◆ When they say thank you
- ◆ When they say thank you, and they go away with a happy face
- ◆ When they understand I am limited to what I can do and thankful
- ◆ When you can give non-legal advice that is helpful
- ◆ When you have that one in a million litigant that is prepared with case number, etc., or has their paperwork completed properly. It makes it really nice to assist them in a speedy manner and they appreciate getting in and out.

9. Do you feel confident that you understand how much help you can give to pro per customers?

³⁶ **69** Yes ³⁷ **20** No

- 10. How were you trained regarding the Court's established instructions, rules or policies, which guide you in responding to requests from pro per customers?**
- ³⁸ **59** Verbal instructions
³⁹ **42** Written policies
⁴⁰ **77** "Learn as you go"
- 11. What services do you think the court should be offering to pro per customers? (Feel free to be imaginative as well as practical in your suggestions.)**
- ⁴³ **64** A walk-in self service center ⁴⁴ **45** Staff dedicated to answering procedural questions
⁴⁵ **59** Informational brochures ⁴¹ **44** More information on the website
⁴² **57** Forms in packets with instructions ⁴⁶ **43** A listing of attorneys, with their specialties and fees
⁴⁷ Other suggestions:
- ◆ A flyer with places for customer to go for help, with current phone #s. Also try and have these places close to the court location.
 - ◆ A list of pro bono attorneys and a volunteer attorney room where help can be given to pro pers even if only one day a week.
 - ◆ Access to Lexis or Nexis
 - ◆ All members of staff should take their turn assisting pro per customers. A benefit to staff is the necessity to read forms litigants read; thereby being able to assist litigants to complete forms
 - ◆ An information class RE forms & procedures prior to court appearance so pro per knows what to expect before coming to court - maybe 4 hour class
 - ◆ Book they can read RE CCP codes
 - ◆ Community outreach clinics at fairs, festivals, cultural events
 - ◆ Court website information pamphlet and list of resources for legal assistance. More public terminals for research by public.
 - ◆ Cut down the number of forms and make the ones we have more user friendly
 - ◆ Dispute resolution alternatives / Resources and services that might be available
 - ◆ Free consultation and referrals for low-income litigants.
 - ◆ Guide book for court appearances
 - ◆ Have a free legal service come here once a month to help pro pers with their case
 - ◆ Help window there all the time
 - ◆ I think we do enough
 - ◆ Include examples of completed forms
 - ◆ Internet very helpful, provide computer
 - ◆ List of organizations where they can get legal advice and help filling out forms.
 - ◆ Lists of all forms broken down by category
 - ◆ Make sure staff is trained properly
 - ◆ Maybe the volunteers can help
 - ◆ More info for cases other than UD
 - ◆ More legal information on premises
 - ◆ Most of the time they do not seem to read the directions given
 - ◆ Periodic workshops to show pro pers how to use resources
 - ◆ Pro per clients should have their order after hearing when they leave the courtroom
 - ◆ Provide employees better training so customers don't feel like we can't help them
 - ◆ Staff dedicated to helping fill out forms
 - ◆ The walk-in self service should have all the forms all information so that the customer does not have to come to the window for additional forms.
 - ◆ The website is confusing to pro pers, many do not have computers
 - ◆ They also should have a place where they could feel comfortable when filling out their paperwork and can take their time answering the questions on the documents/forms

12. The original survey was incorrectly numbered. There was no question 12.

13. Are there any other comments you would like to add about the Court's services for the public? We are especially interested in your ideas regarding the operation and services of court sponsored self-help centers.

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- ◆ "Service Center" is ideal to assist in multi languages.
- ◆ Extend the time of Family Law Facilitator
- ◆ Give employees a tour of law library and what kinds of resources my customers can expect to find there to aid in their divorce case
- ◆ Give staff training on Internet websites to help pro pers
- ◆ Have center available for walk-ins and emergency situations
- ◆ I feel that this self help center action plan will be a success in providing essential information for pro per litigants in processing their case in a more understanding and efficient manner
- ◆ I think the court would benefit greatly by going to a 4/10 work week. Closing at 4:00 hasn't helped. In most cases the public is here until 4:30.
- ◆ In theory, court services for the public sounds great. I question stretching responsibilities to our existing staff.
- ◆ Inform staff of Self Help Center operating days and times. Give staff an orientation so staff can reinforce what is provided at center.
- ◆ It's extremely important that pro per clients have equal access to the legal system and are afforded the same treatment as paying clients
- ◆ List times when volunteers are available (by subject) to answer questions
- ◆ More personnel and time to help them
- ◆ Pay for ideas and suggestions, it would be an incentive
- ◆ Perhaps a computer room where someone can show them how to view and print their own forms.
- ◆ Properly train employees. When everyone is lost it makes the job a lot harder.
- ◆ Provide more attorney information. Possibly set up an area where attorneys can provide services to the public.
- ◆ Self help service centers open during regular court hours can assist varying schedule (e.g. people can drop in during their lunch hours). At this time, they can get other search resources (e.g. websites, lawyer referral service phone number, law center number, courthouse locations & phone numbers for other courts
- ◆ Self-help center should provide info, forms, and referrals. Not filings.
- ◆ Should provide assistance at all times, not just a few hours daily.
- ◆ Simplify instructions or give samples of forms filled out in lobby or next to computer
- ◆ Staff help before court needed. Self-help and staff needed for after order is made - what the order means in their situation.
- ◆ The courts need better signs in many languages directing pro pers to departments and services
- ◆ The self help desk person should be someone who has worked at the front counter - we could service the pro pers a lot better and save us time.
- ◆ There needs to be a procedure on limits of info we can give to pro pers. I have in the past helped a customer with domestic violence paperwork and an attorney in line behind the customer I was helping wrote a letter to the court about my giving legal help.
- ◆ There should be a pro per clerk in each division for consistency in answers to questions, like FL facilitator
- ◆ There should be a self help center at each courthouse
- ◆ Toll-free 1-800 court help
- ◆ Updated resources. Make sure employees remain professional and enjoy what they are doing.